FOIAonline Training

December 2017

Agenda – FOIAonline Training



- Terms & Definitions
- Role Explanations
- Introduction/User Credentials
- Look and Feel Overview

- Submission
- Evaluation
- Assignment
- Processing
- Close Out
- Advanced Topics

Module 1

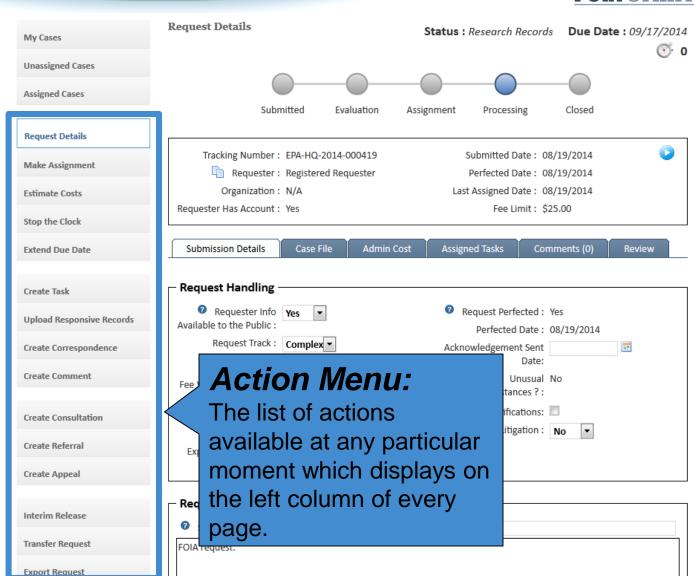


- Action Menu: The list of actions available at any particular moment which displays on the left column of every page.
- **Button**: An object that can be clicked to save, complete, or cancel actions taken on the page. Buttons are green with white text throughout the system.

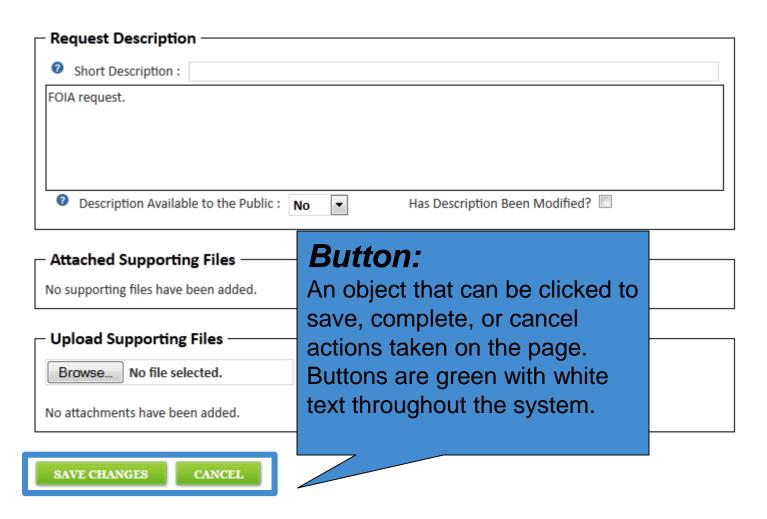
Dashboards

- My Cases: Available to all agency users. It collates all requests, appeals, tasks, referrals, and consultations which are assigned to the currently logged in user.
- Unassigned Cases: The landing page for agency users who are responsible for distributing materials throughout the system. It collates all materials which are assigned to the currently logged in user's organization.
- Assigned Cases: Available to agency users who are responsible for distributing materials throughout the system. It collates all materials which are assigned to organizations or individuals below the currently logged in user within the organizational hierarchy.
- Switchboard: A user who operates as a distributor of items throughout the system.
- Tab: Used throughout the system to access new pages. The active tab is white with black text, while inactive tabs are blue with white text.
- **Task**: Used to facilitate access to a request, appeal, or referral for users other than the individual assigned to the request, appeal, or referral.

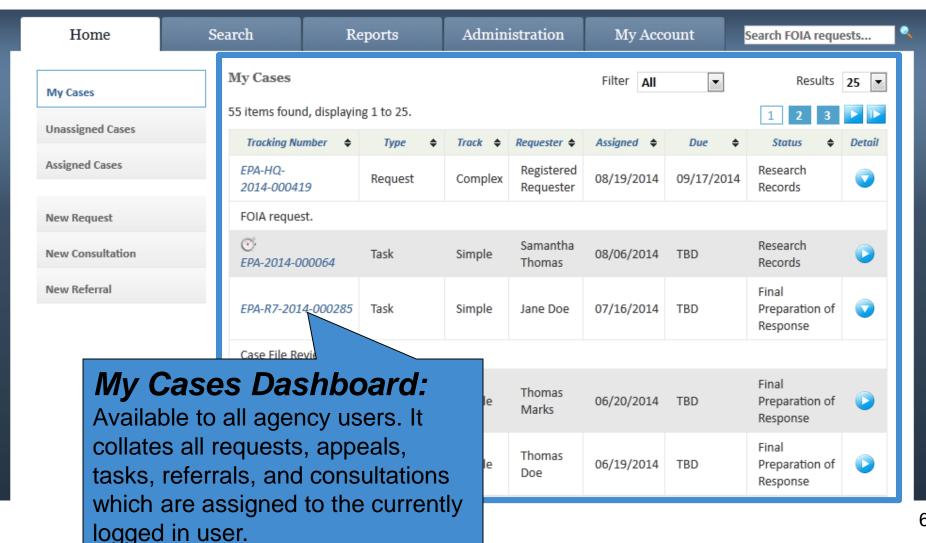






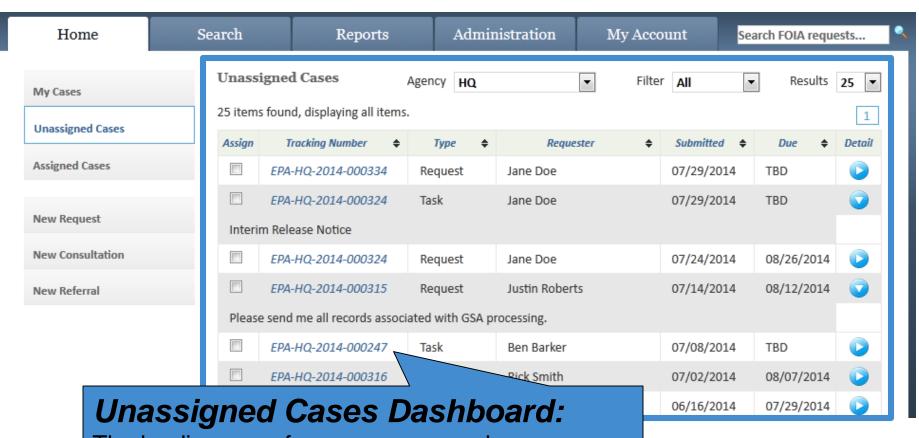






Module 1

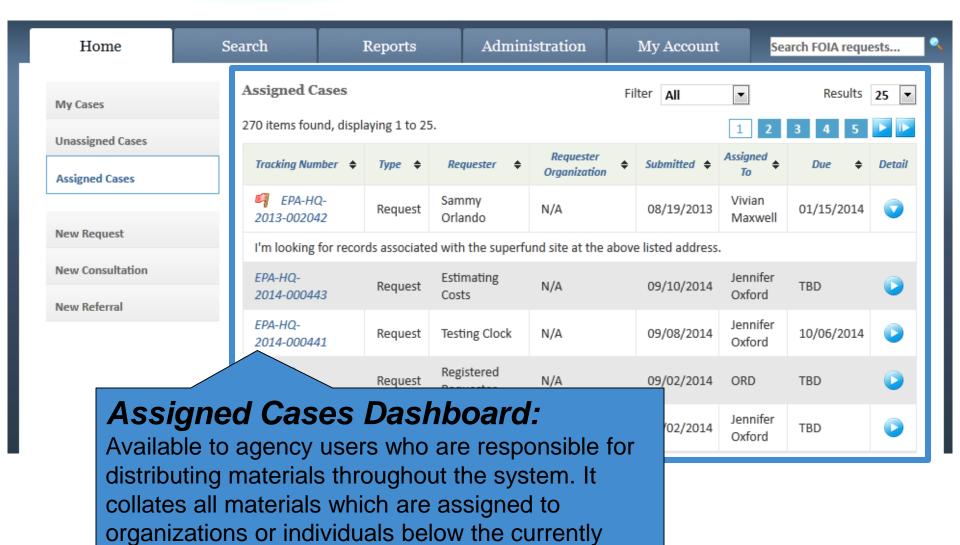




The landing page for agency users who are responsible for distributing materials throughout the system. It collates all materials which are assigned to the currently logged in user's organization.

Module 1





logged in user within the organizational hierarchy.

Module 1



Switchboard:

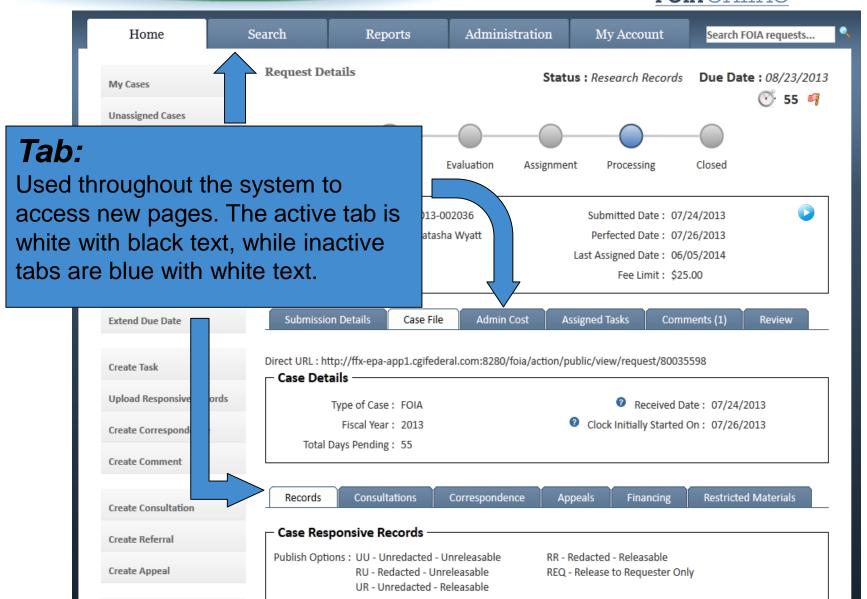
A user who operates as a distributor of items throughout the system.



Export options: CSV | Excel

– Make Assignment -				
_				
Note: Depending on the r	number of items being	g assigned, assignments	may not be made immediat	ely after saving.
Organization Assignment	:			
Individual Assignment	:			
Assignment Comments	:			
SAVE CHANGES	ASSIGN TO ME			





Module 1



Submission D	etails (ase File	Adı	min Cost	Assigned Tasks		Comments (1)	Review	,
Outcome \$	Assigned To	♦ Assigned	iBy ♦	Date Sent ▼	Due Date	\$	Closed Date ♦	Notification	Detail
Pending	Maggie Har	t Jennife Oxford		04/07/2014		¥5			0
Pending	Maggie Har	t Jennife Oxford		04/02/2014		=			
Pending	Julie Matthews	Jennife Oxford		03/04/2014		15			•
Records Uploaded	Jennifer Oxford	Jennife Oxford		02/19/2014	02/21/2014		02/19/2014		 The state of the state</td
Description : Please search for responsive records.									
Comments: Uploaded X, Y, and Z records to the case file. Searched A, B, and C files.									
Other	Jennifer Oxford	Jennife Oxford		01/15/2014	01/16/2014		01/15/2014		
Pending	Jennifer Oxford	Jennife Oxford		12/11/2013	12/18/2013				
Pending	Jennifer Oxford	Jennife Oxford		12/11/2013	12/18/2013	115			
Partial Grant	HQ	Jennife Oxford		10/21/2013			12/03/2013		•

Task:

Used to facilitate access to a request, appeal, or referral for users other than the individual assigned to the request, appeal, or referral.

SAVE CHANGES

UPDATE NOTIFICATIONS

Roles Defined



- Each of you is given at least one role
 - Some of you are the National Team the highest role
 - Some of you are Coordinators for an office—full access across the office
- Roles give you access to your part of the organizational chart AND below
 - Your office
 - Offices within your office
 - Offices within offices below yours
 - ...and so on
- Two factors determine the role you are given
 - Do you act on behalf of the entire agency, an entire office, or within office?
 - Do you manage work assignments?



What is a role?

My job is	I am typically a	This allows me to
In the National FOIA Office, receiving requests and routing them across the Agency.	National Team role at the highest level of the organizational chart.	 View and edit any open FOIA request across my agency. Assign any item to anywhere or anyone in the Agency Approve items such as extensions Backdate offline closures Reopen any case across the agency
Within an office , leading FOIA processing, possibly as a FOIA Officer.	Coordinator role at the office in which I work.	 View and edit any open FOIA request across my office. Assign any item to anywhere or anyone in my office OR to another office Approve items such as extensions Backdate offline closures



What is a role?

My job is	I am typically a	This allows me to
In a Branch or Division within an office, acting as the FOIA Lead for my office.	Public Liaison	 View and edit any open FOIA request across my Branch/Division. Assign any item to anywhere or anyone in my Branch/Division OR to another Branch/Division at my level in the organizational chart
In a Branch or Division within an office, processing FOIA requests that are assigned to me.	Professional -or- SME	View and edit any open FOIA request that is assigned to me.



What is a role?

My job is	I am typically a	This allows me to
In an Appeal Processing Unit such as an OGC, processing Appeals for the Agency.	Public Liaison AND Reviewer	 Get Appeals automatically assigned to my office upon creation. View and edit any open Appeals assigned to my office. View any FOIA request across the Agency

Roles – Switchboards

Module 2



National Team Role

(Switchboard, WITH Admin rights)

Coordinator Role

(Switchboard, WITH Admin rights)

Public Liaison Role

(Switchboard, WITHOUT Admin rights)

USPC

Sub-Office 1

Each of these offices identifies a small group of people to get one of FOIAonline's "switchboard" roles to be able to route requests.

- •National Team Oversees all of agency including administrative functions
- •Coordinator Oversees an entire office, including administrative functions
- Public Liaison Oversees an office within an office, with no administrative functions

Roles – Switchboards



- The only roles who can assign requests and task are switchboard roles
 - National Team
 - Coordinators
 - Public Liaisons
- Now, where can these people assign items?
 - Imagine the organizational chart
 - Think of where you sit where you act on behalf of
 - Use the table at the right to help you

Which Offices can I assign to?	Which Individuals can I assign to?
Look Left	
Look Right	
Look Up	
Look Down	Look Down